Department of Biochemistry

Biochemistry Purchasing System

User Manual: Guest Lab

09

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Introduction

The Biochemistry's Administration & Finance Office is a team of dedicated professionals whose focus is to facilitate and support the teaching and research efforts of the department. We seek to efficiently manage the department's available funding and resources in order to meet the growing needs of the department, effectively manage the physical infrastructure of the department and to ensure the timely delivery of goods and services. We actively seek to provide excellence in customer service, in keeping with the standards and values of the University.

We have initiated the implementation of the Biochemistry Purchasing System (BPS) to replace the current paper procedure used by the Biochemistry labs to place orders. BPS is a sophisticated, web based, dependable, easily maintained database system.

BPS provides you with:

- An approval flow process that supports the requirements of the many different funding agencies that support Biochemistry's research.
- Order tracking so that you can identify where your order is in the process, from order submission to product receipt.
- A central repository for all documentation associated with a purchase, and documentation that is retrievable at any time, with minimal effort. This is required for the effective management and reporting of our grant spending.
- Reporting that can provide information to make the most of your purchasing dollars and reduce time and effort.
- Software can be deployed and configured without an IT department.

System requirements

BPS is a Web based application that can be accessed from any computer with an internet connection. There is no additional software needed.

It has been tested using these browsers:

- Internet Explorer 7.0
- Firefox 5.0
- Chrome 1.0
- Safari 4

Getting Started

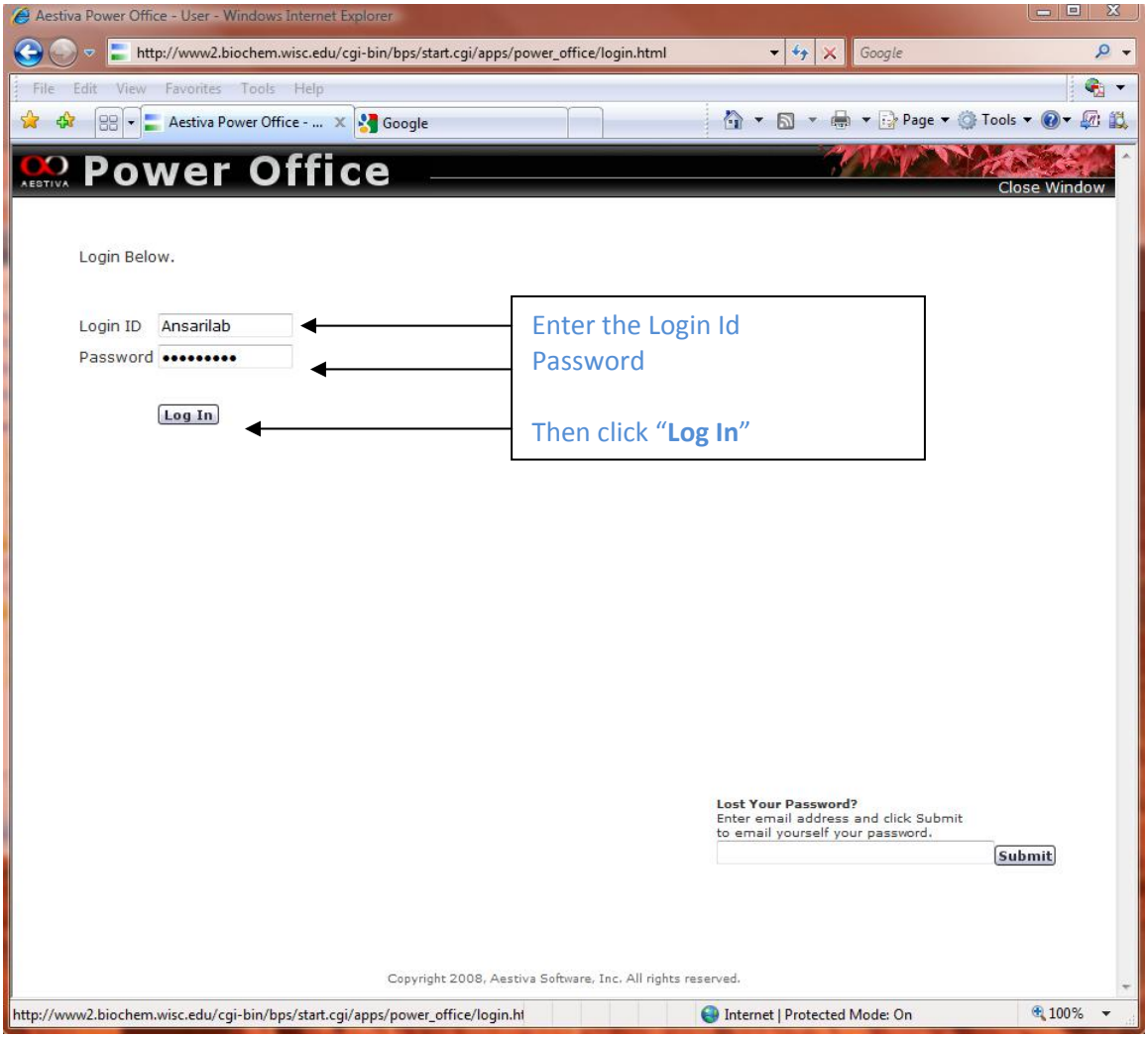
This is the starting URL. Enter it into your browser and add it to your "Bookmarks".

http://www2.biochem.wisc.edu/cgi-bin/bps/start.cgi/apps/power_office/login.html

It displays the login page.

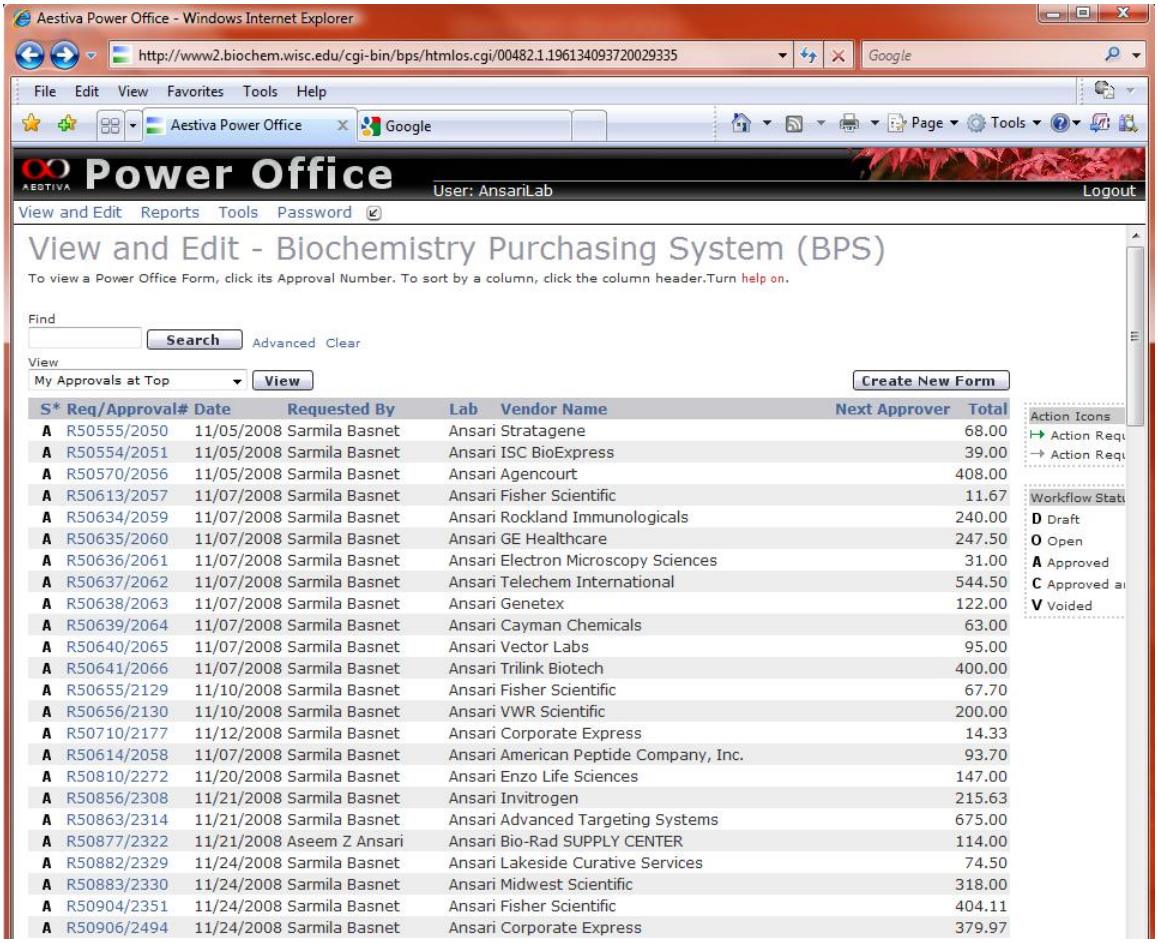
For the Guest Lab use:

- Login ID: **Guest**
- Password: **Guest**
- Click "**Log In**"



The View and Edit Page

After logging in, the “View and Edit” page is displayed. The “View and Edit” page is your starting point for creating an order, reviewing existing orders and creating reports. Creating an order will be explained next, the other options are explained in later parts of this manual.



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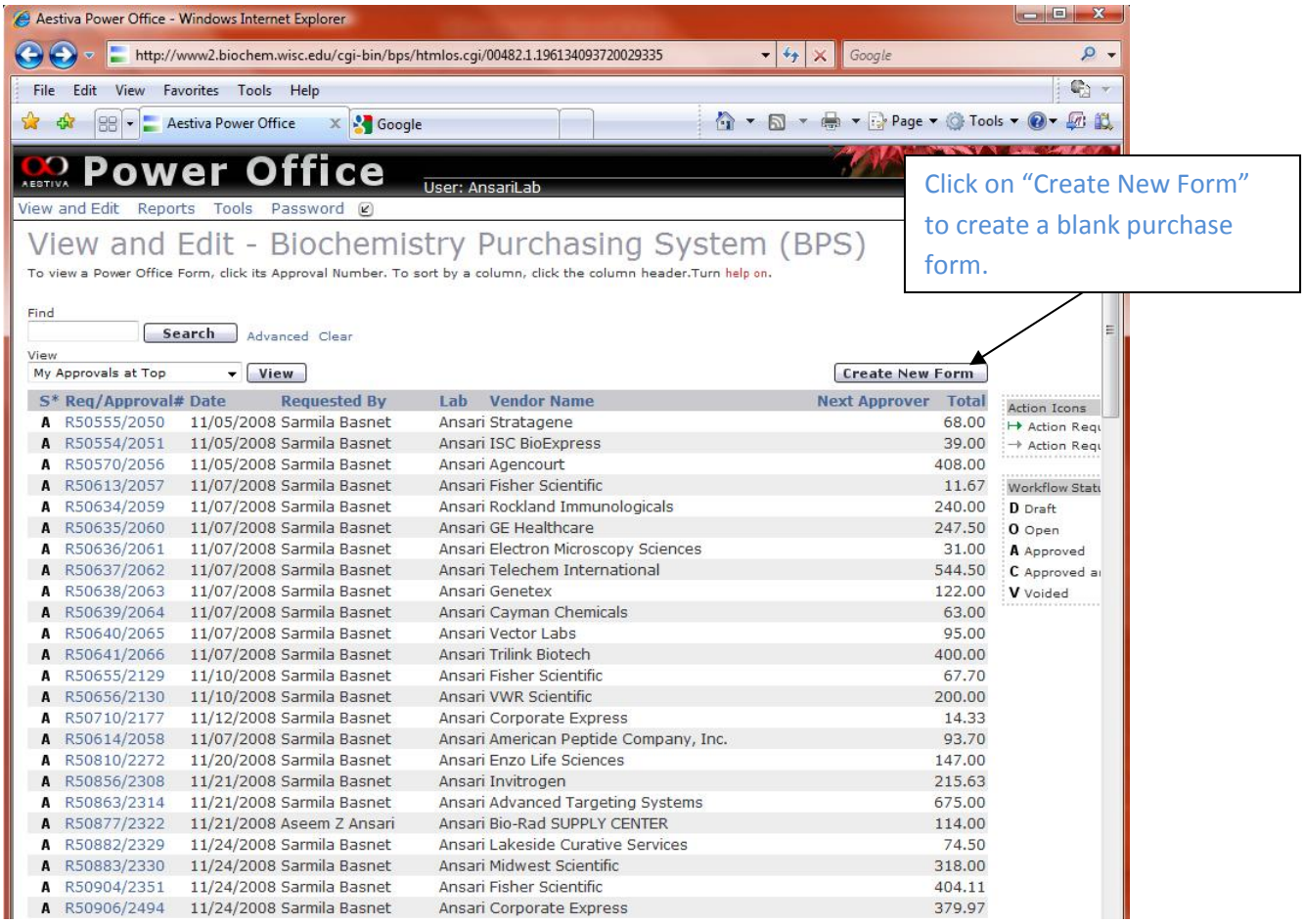
Placing an order

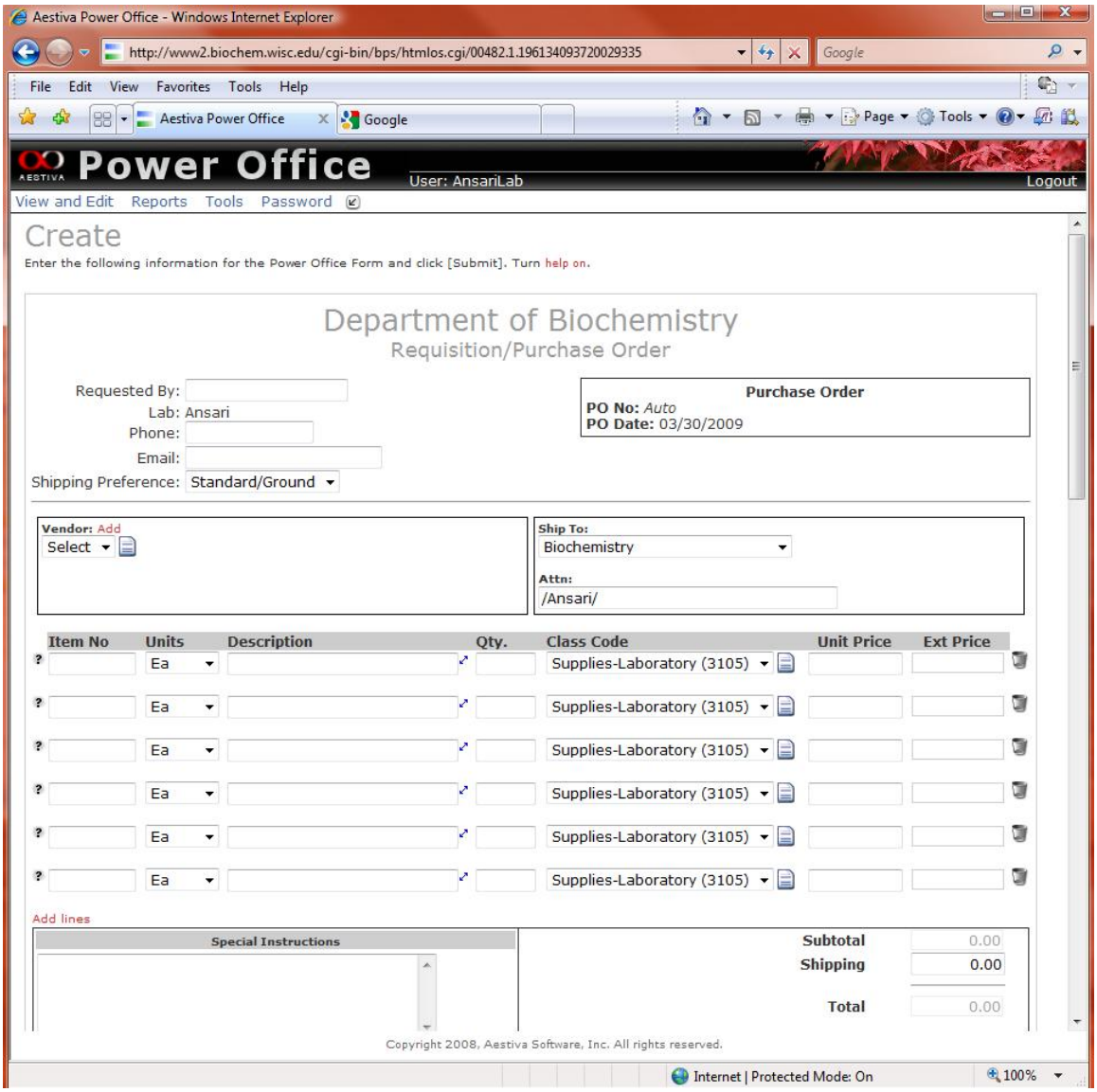
Follow these steps to place an order with the Biochemistry purchasing department.

- Click “Create New Form”



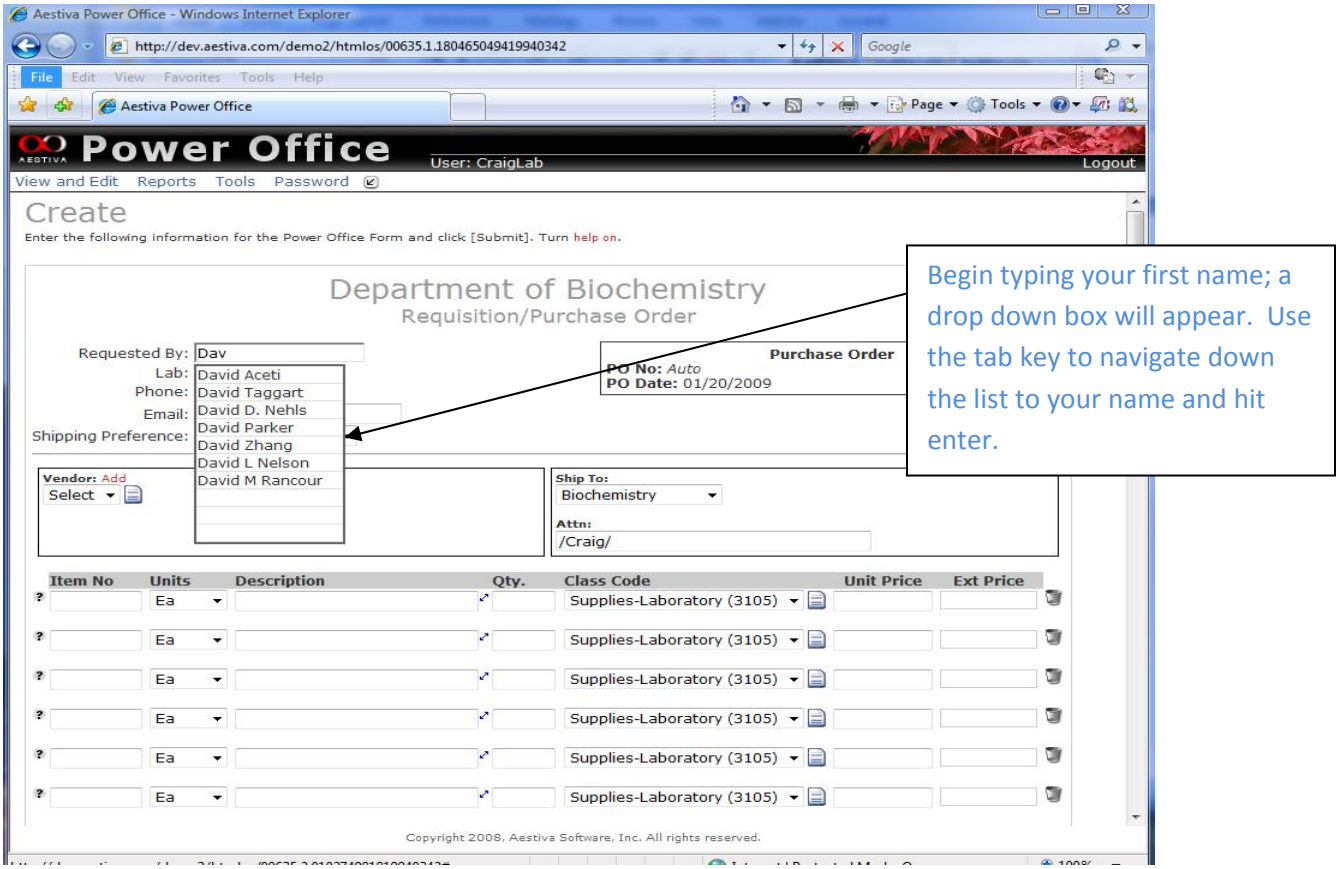
The Purchasing Request Form

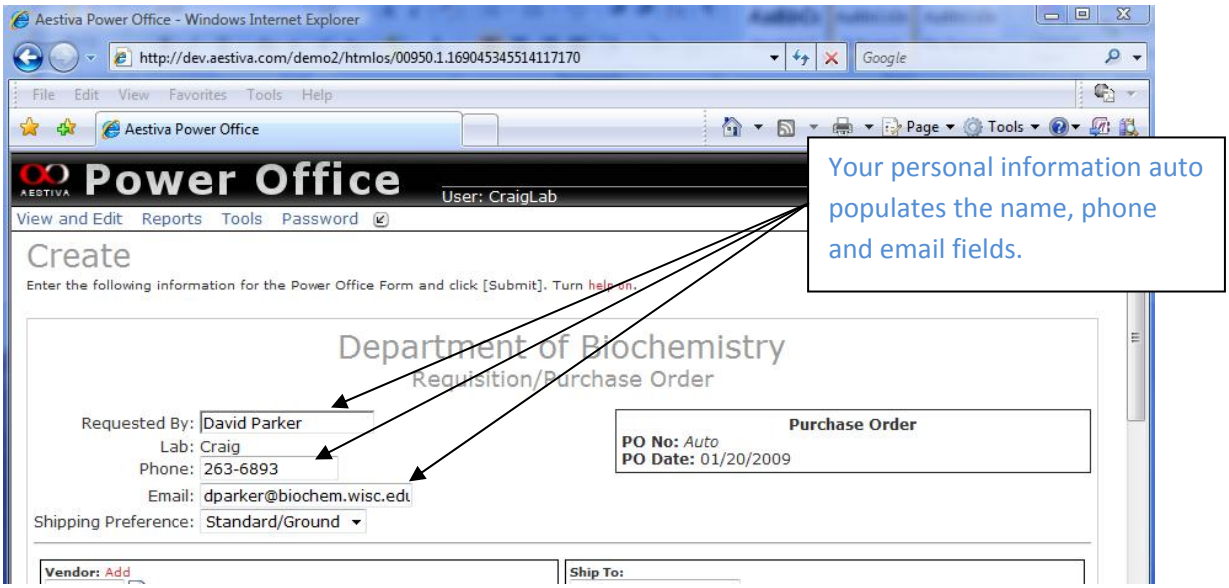
A blank Requisition/Purchase Order form is created. The "Lab" field is automatically populated based on your user login id, and cannot be changed.



Filling the Purchase Request: Personal Information

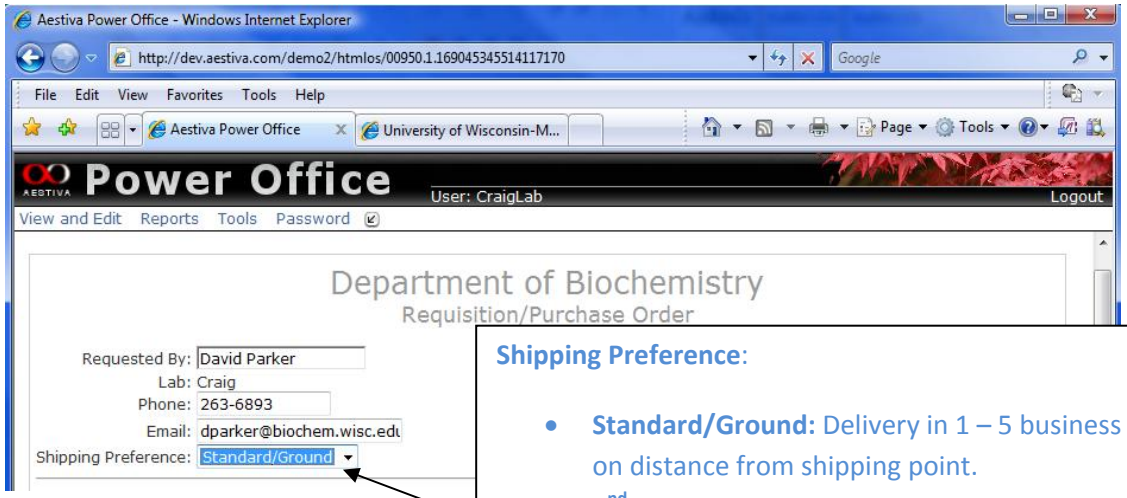
Begin by entering your name into the “Requested By’ field, this will auto populate Phone and Email. Note: you must have your name listed in the Biochemistry directory to use this system.





Select Shipping Preference

Select the shipping choice that is most appropriate for your needs.

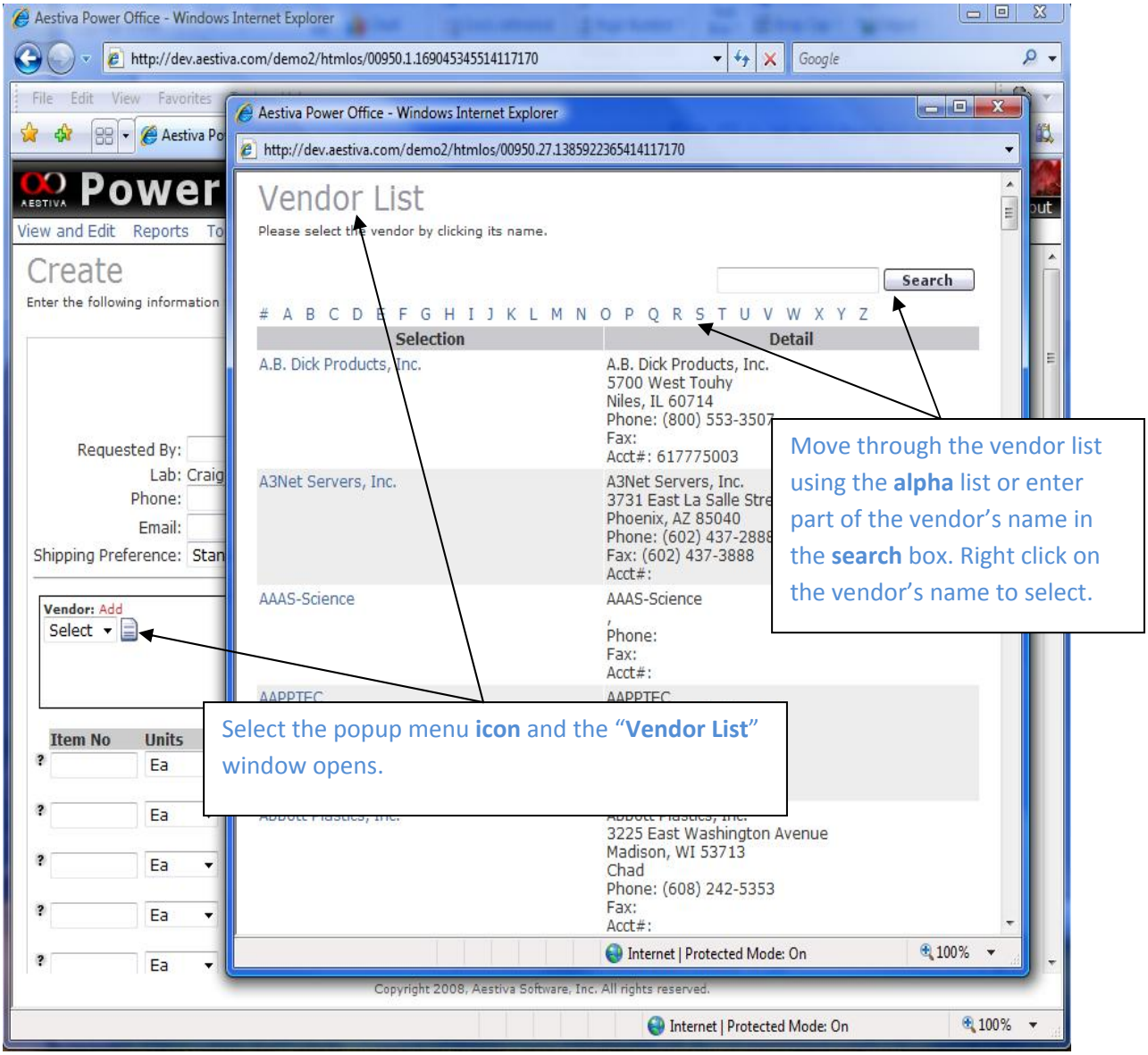


Shipping Preference:

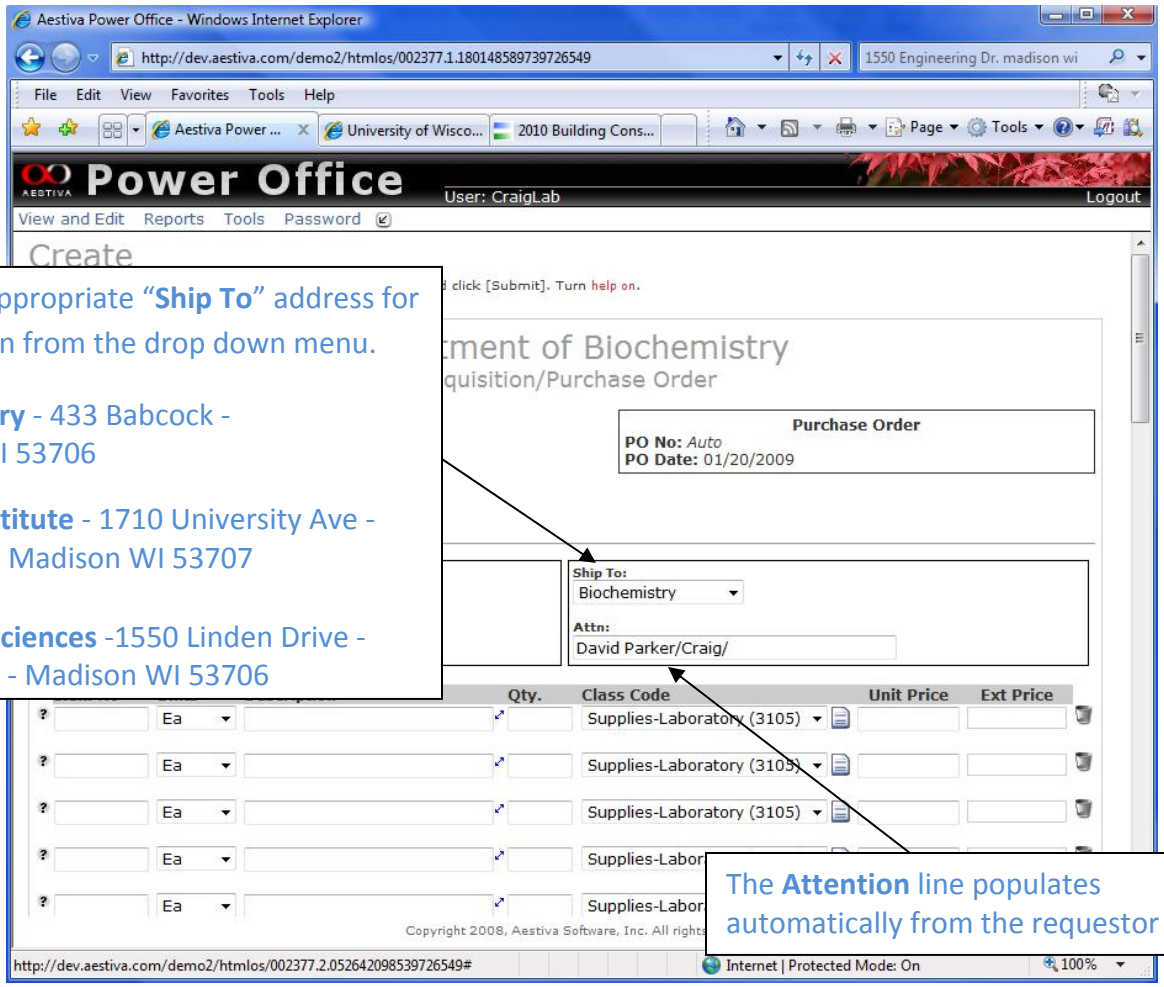
- **Standard/Ground:** Delivery in 1 – 5 business days, based on distance from shipping point.
- **2nd Day:** Delivery in 2 business days by 4:30 p.m. to most areas.
- **Local:** Taxi or parcel delivery service.
- **Overnight Delivery:** Next business day by 10:00am
- **Best:** Purchasing will process using their best judgment based on criteria such as the selected vendor and items being purchased.

Select Vendors

We have preloaded over 1200 vendors that are commonly used by the Biochemistry department. Click on the menu icon to open a "Vendor List" window.



Select Ship To location



Select the appropriate "**Ship To**" address for your location from the drop down menu.

Biochemistry - 433 Babcock - Madison WI 53706

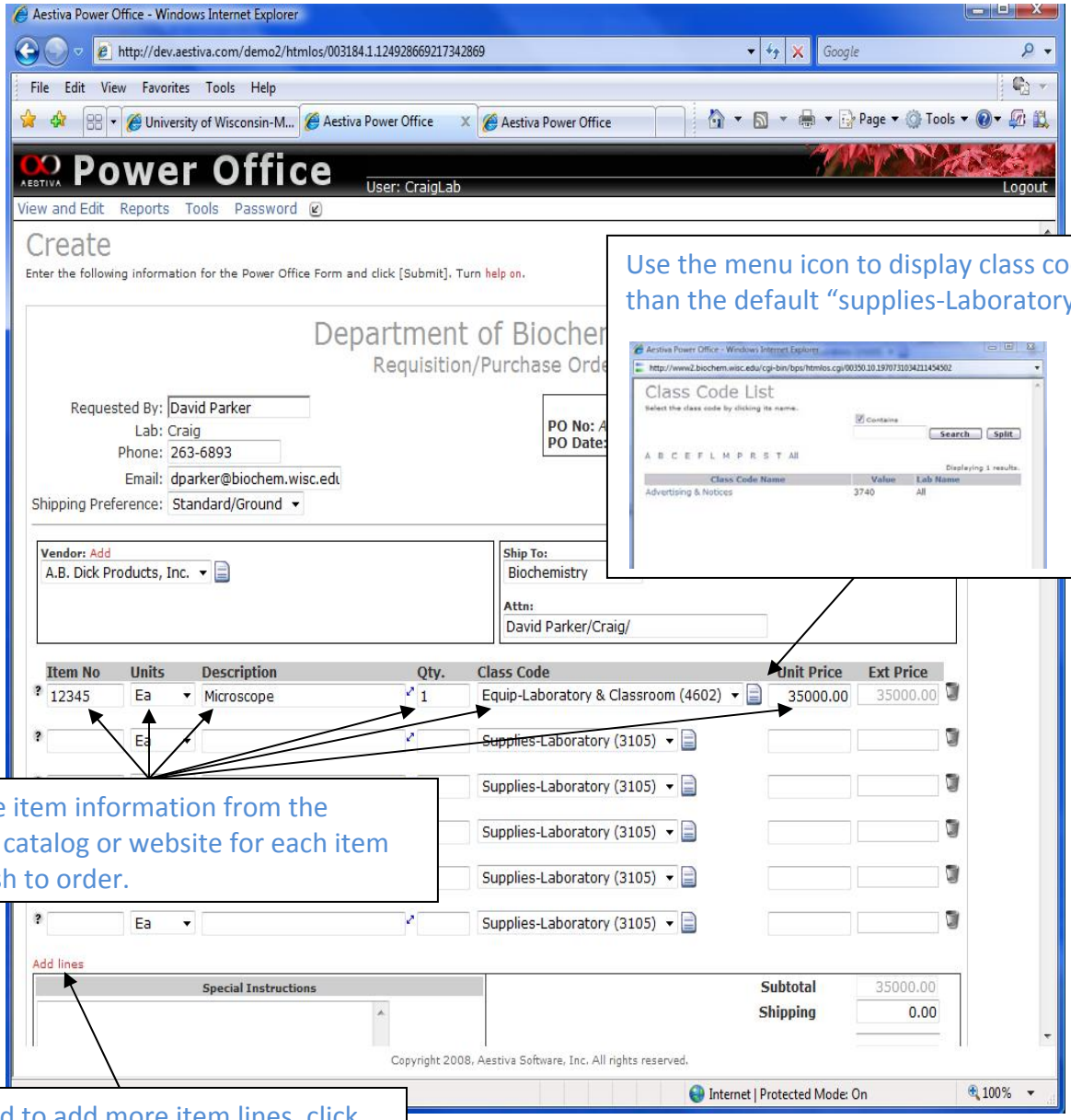
Enzyme Institute - 1710 University Ave - Room 196 - Madison WI 53707

Microbial Sciences -1550 Linden Drive - Room 5445 - Madison WI 53706

The **Attention** line populates automatically from the requestor data.

Enter items to be ordered

Enter the items you wish to order using the vendor's catalog or website. The class code default to "supplies-Laboratory (3105), if this is incorrect for this item, then select the menu icon to open a class code list.



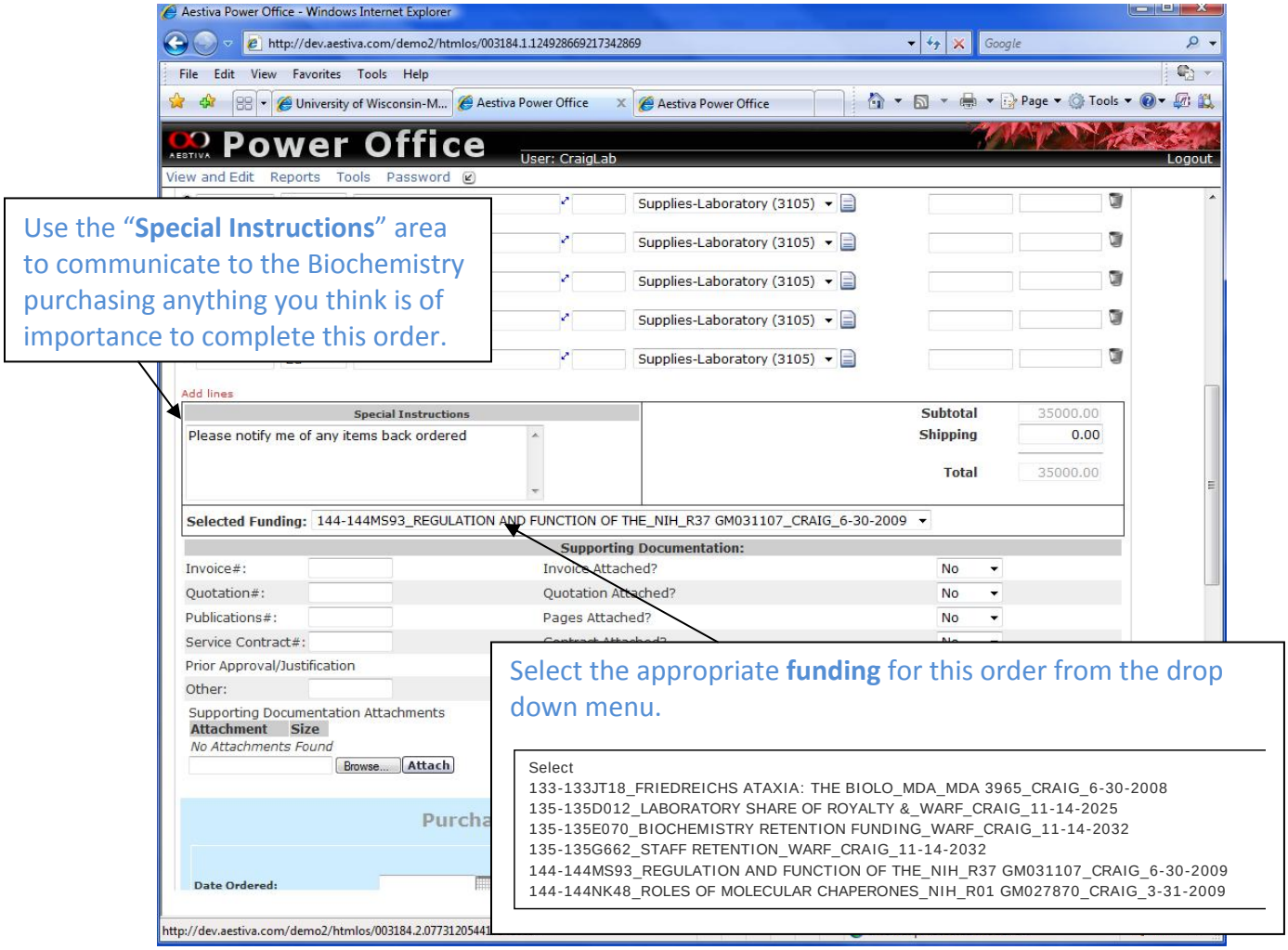
Use the menu icon to display class codes other than the default "supplies-Laboratory (3105).

Add the item information from the vendor catalog or website for each item you wish to order.

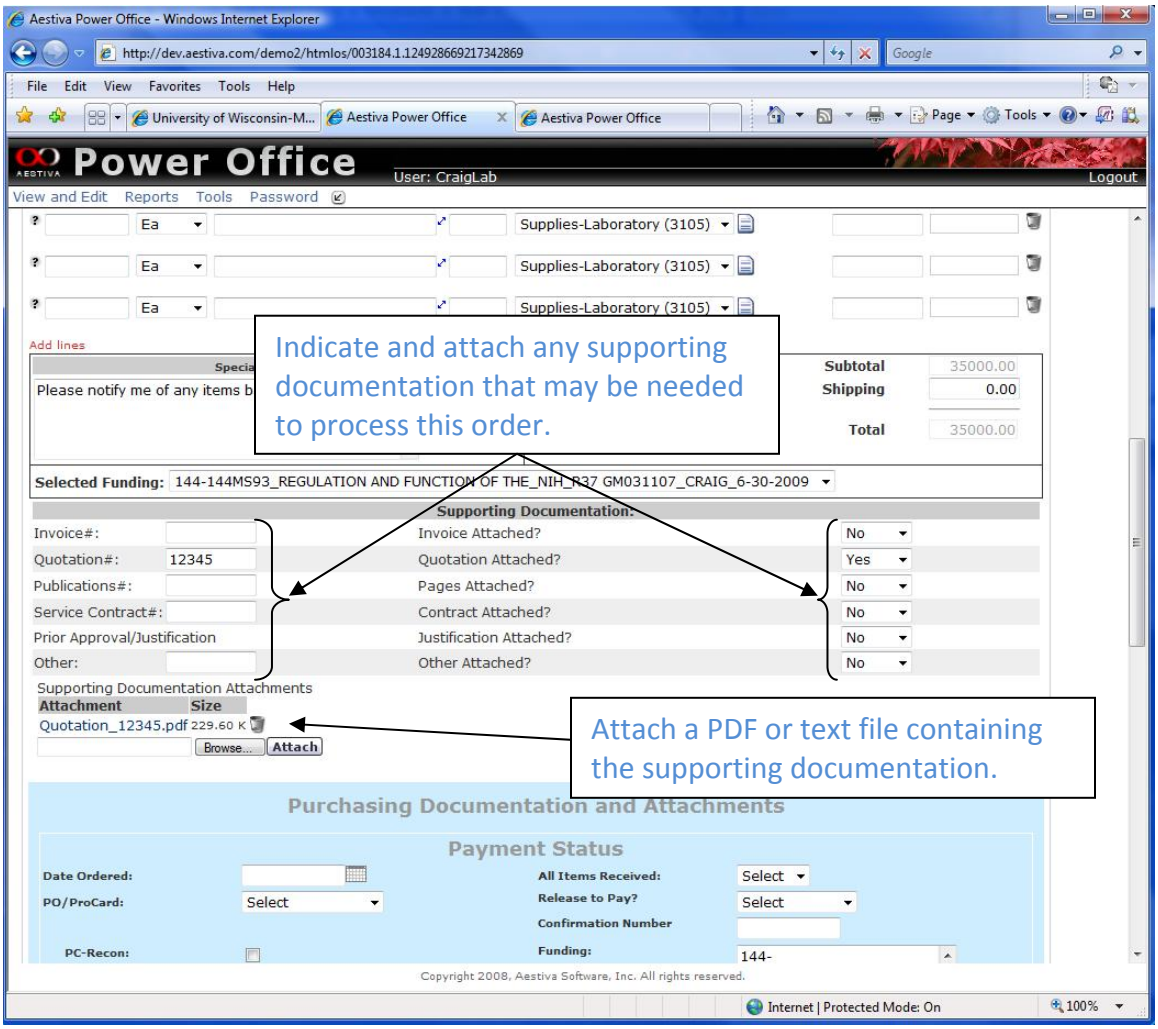
If you need to add more item lines, click "**Add Lines**" and the system will add five addition lines.

Selecting funding and special instructions

Funding needs to be selected carefully. Review with your Professor or Lab Manager. Only funding for your lab will be available in the drop down menu.



Supporting documentation

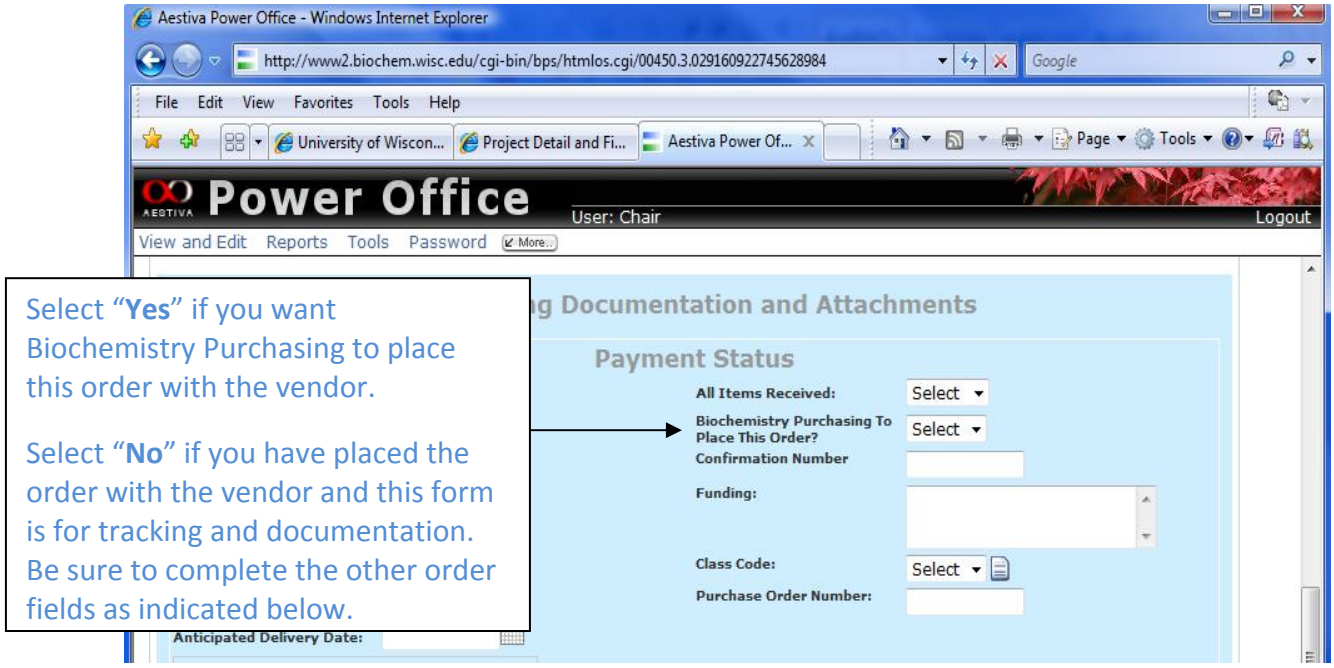


How to attach a file:

1. Select “Browse”
2. Direct the dialog box to the file’s location
3. In the dialog box select the file you want to attach, click “Open”
4. On the purchase request form, click “Attach”
5. Your file name should be listed under the “Attachment” heading

Indicating if Biochemistry Purchasing should place this order.

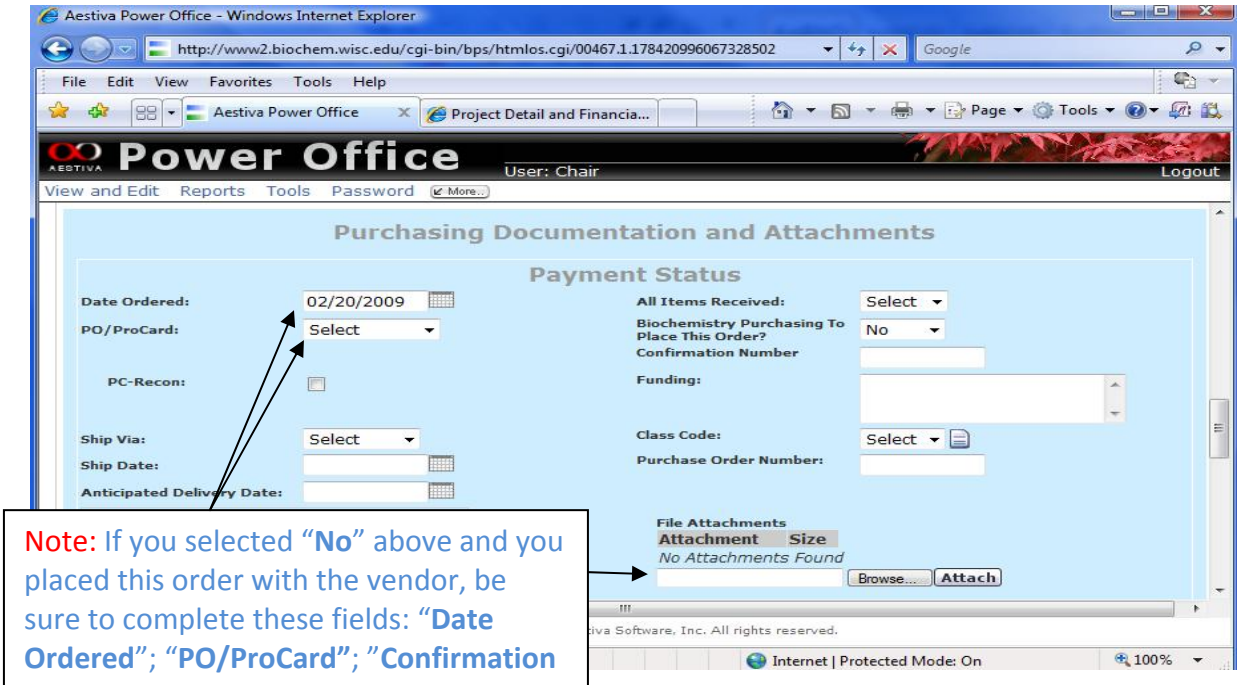
This required field is used to indicate if you have already placed this order with the vendor and you created this form for tracking only, or if you want the Biochemistry Purchasing group to place this order with the vendor.



Select "**Yes**" if you want Biochemistry Purchasing to place this order with the vendor.

Select "**No**" if you have placed the order with the vendor and this form is for tracking and documentation. Be sure to complete the other order fields as indicated below.

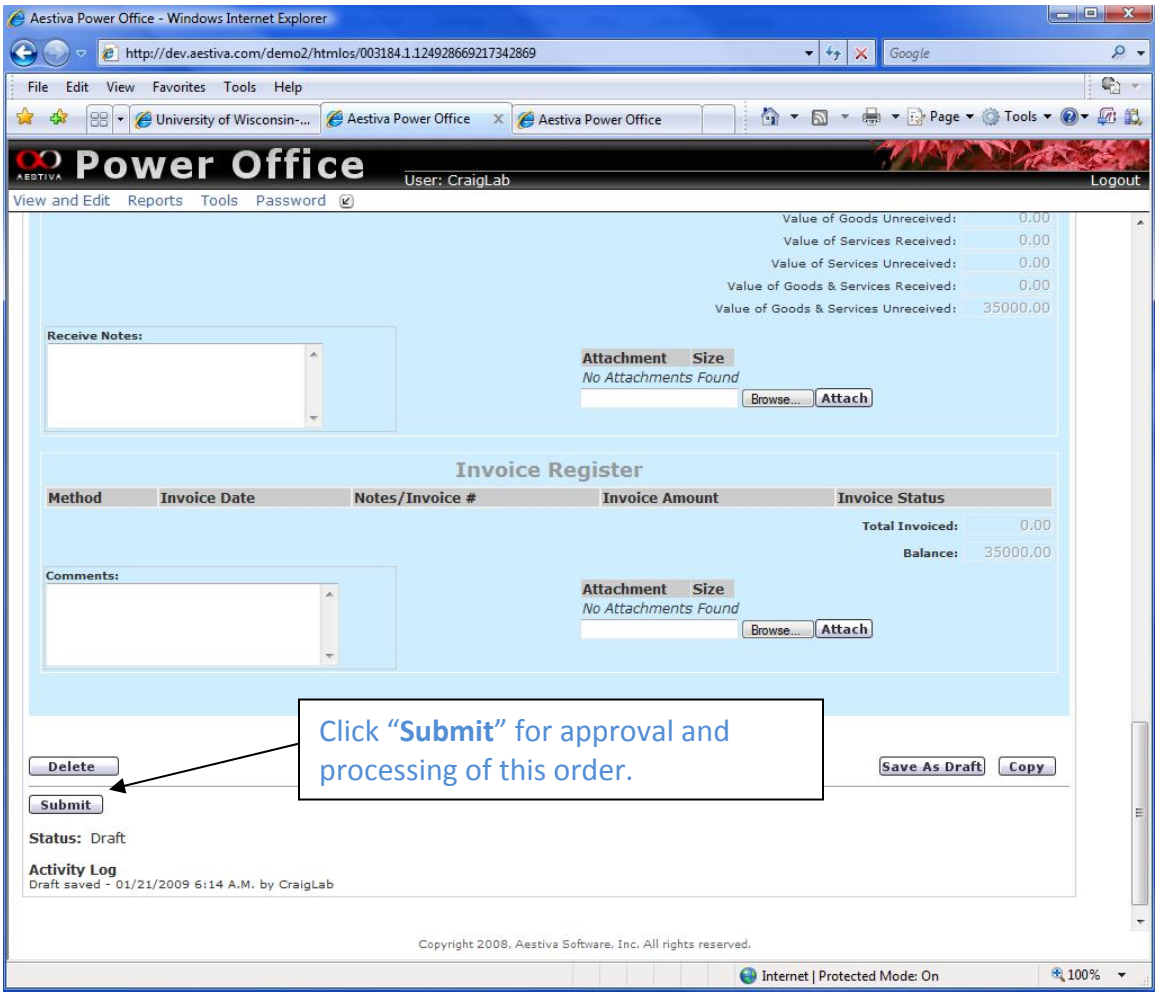
If you selected "No" above, be sure to complete these other order fields:



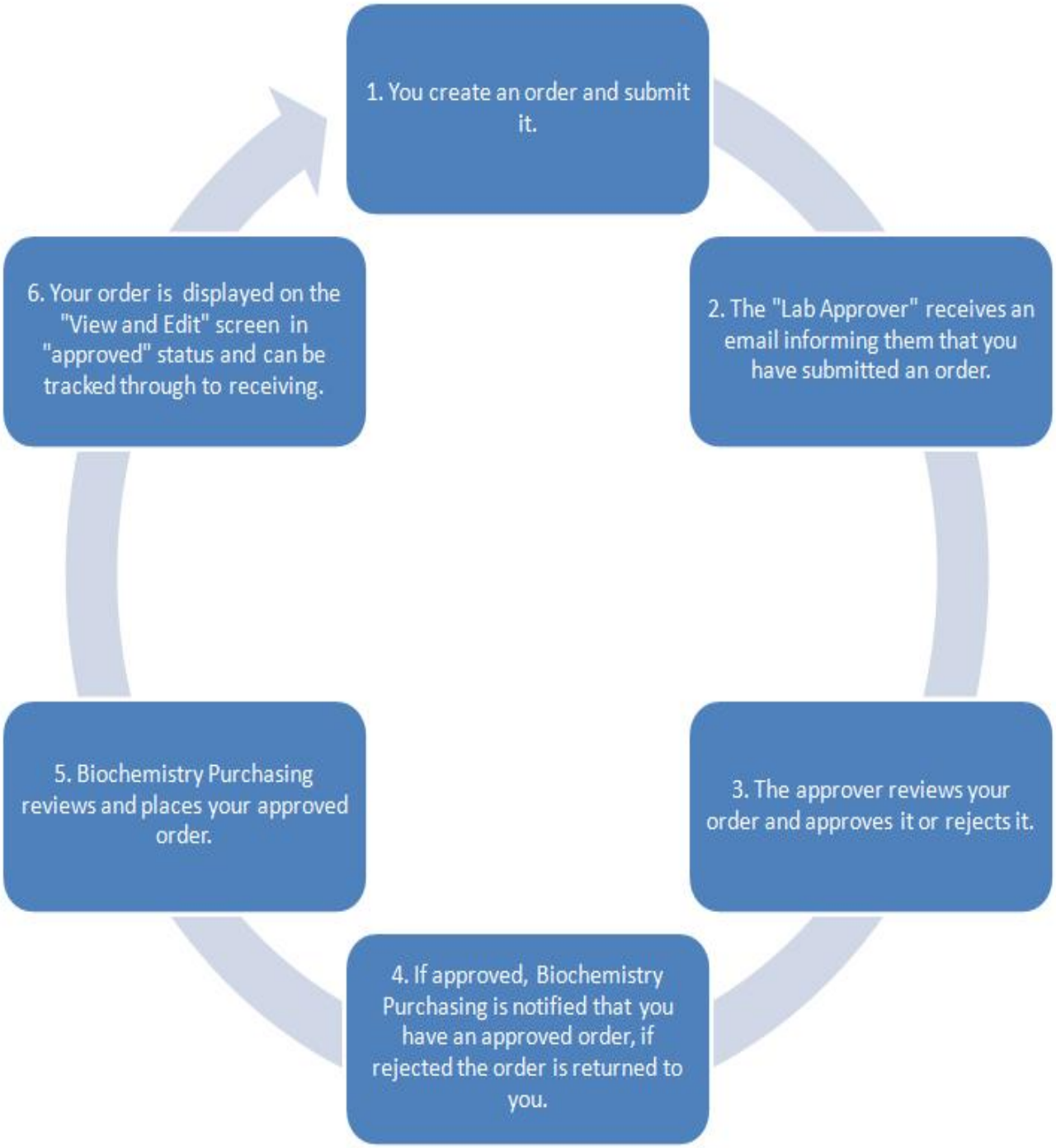
Note: If you selected "**No**" above and you placed this order with the vendor, be sure to complete these fields: "**Date Ordered**"; "**PO/ProCard**"; "**Confirmation Number**"; and attach any order confirmation hardcopy.

Submitting your order

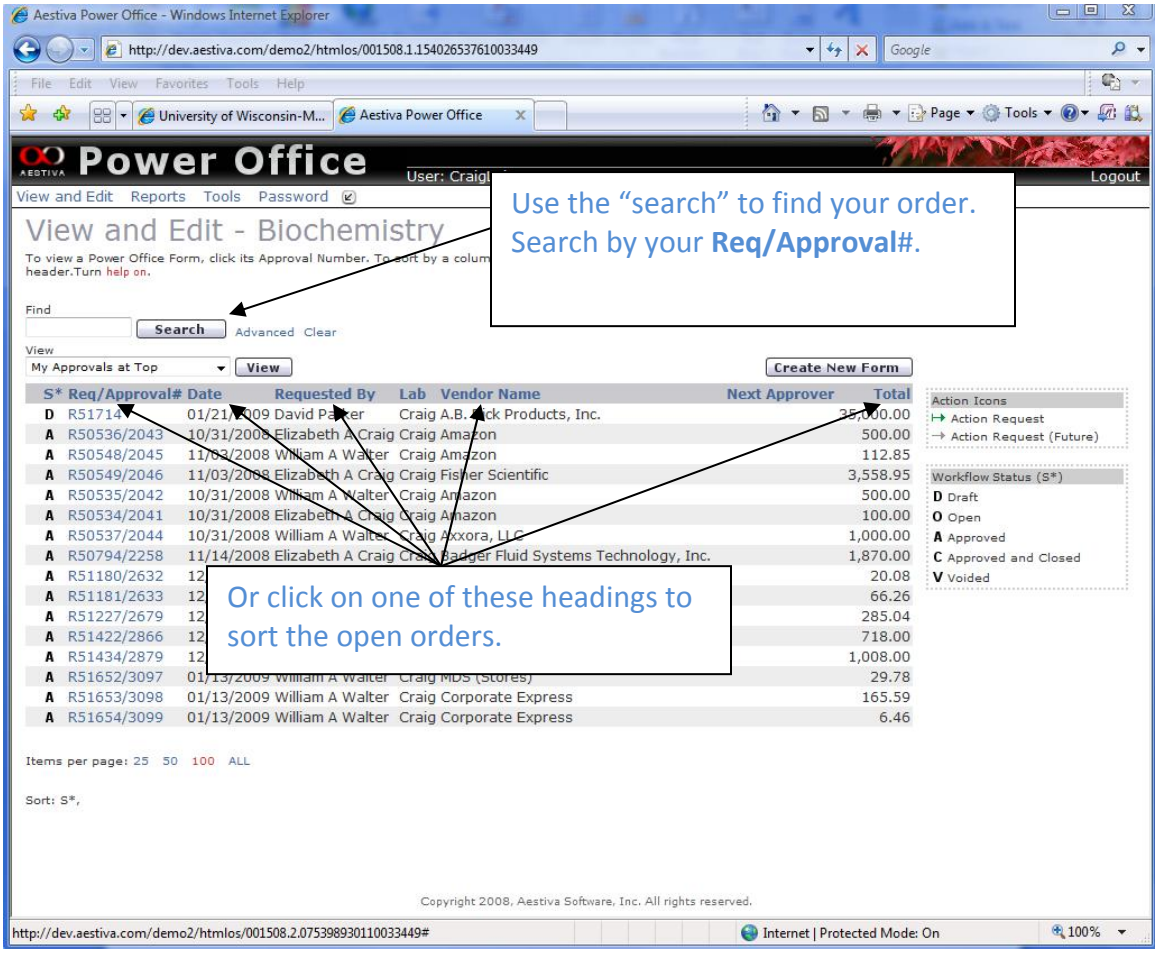
Review your order for completeness and correctness and then click “Submit” at the bottom of the Page.



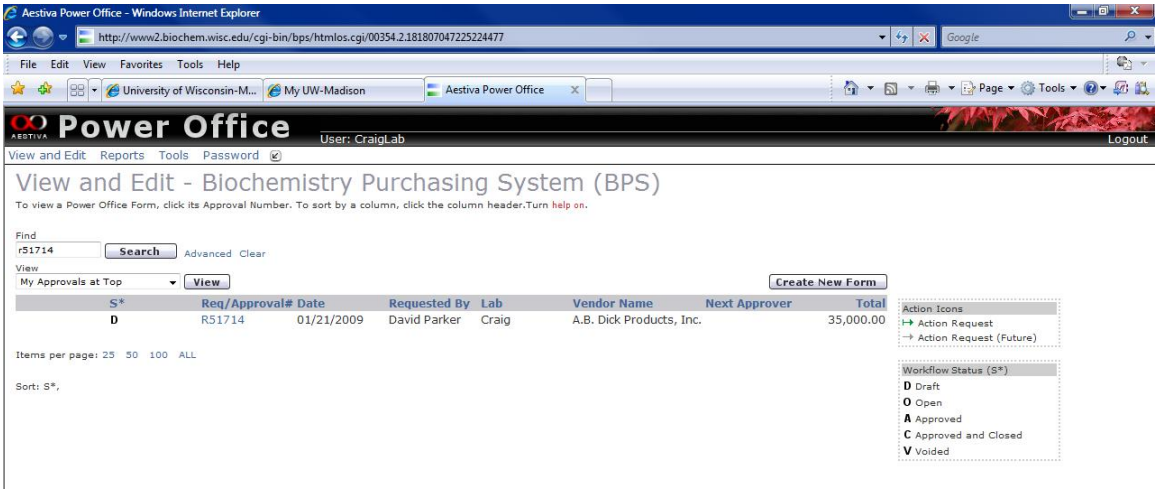
What happens after I submit an order?



Viewing and tracking your order

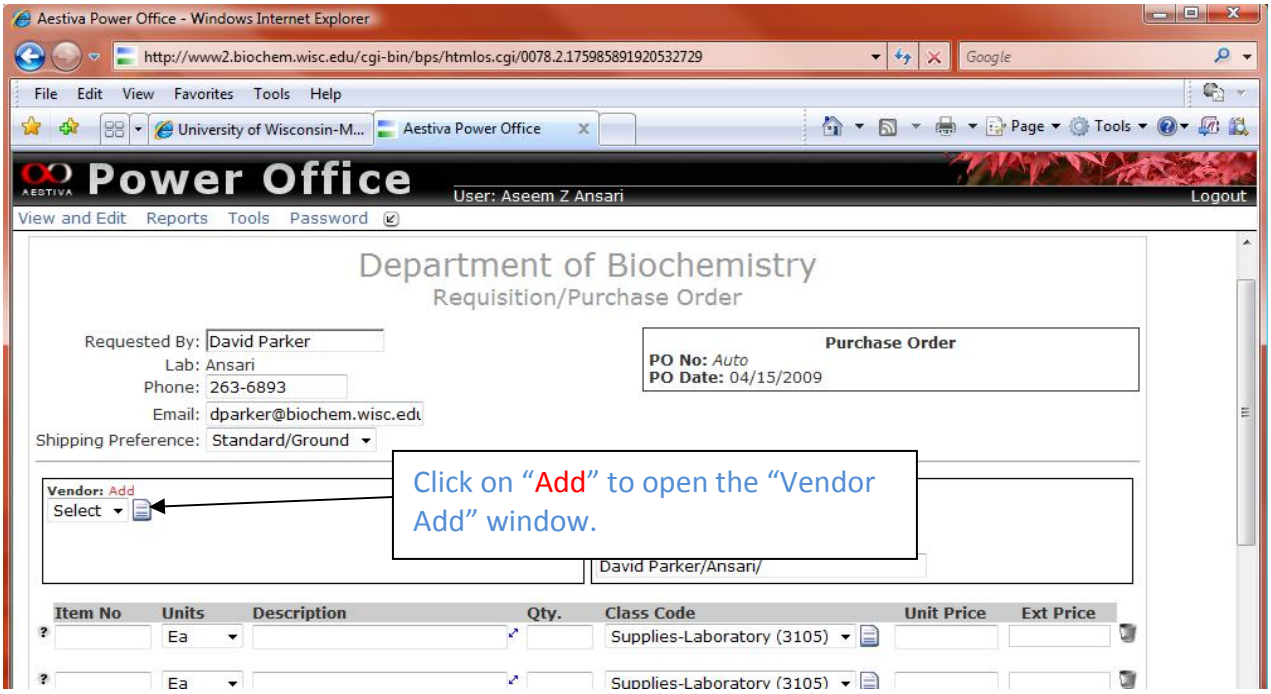


Search Results

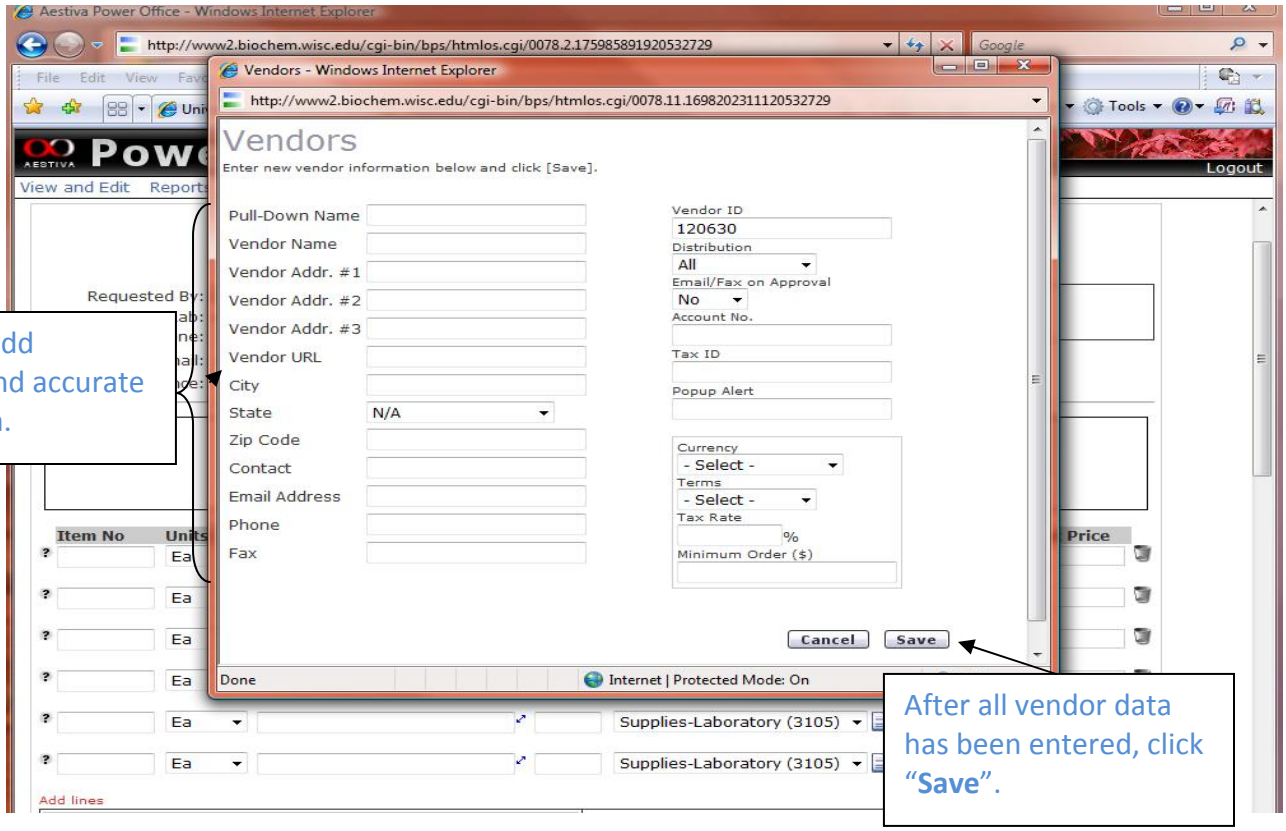


Adding a new vendor(1,2)

To add a vendor that is not in the vendor list: Click on “Add” to open a window.

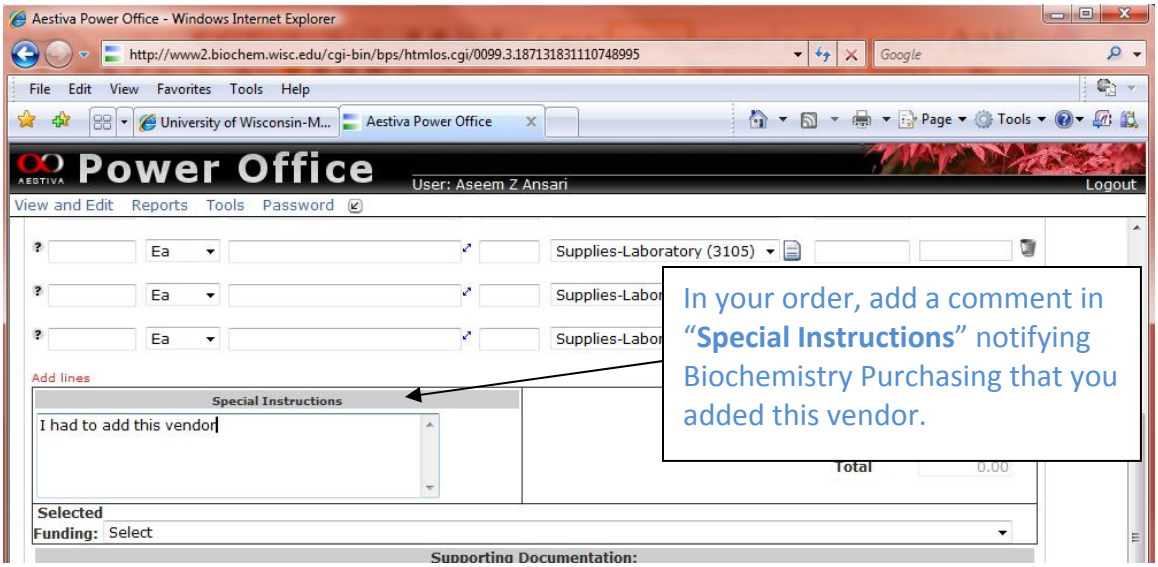


Enter the complete data for the new vendor.



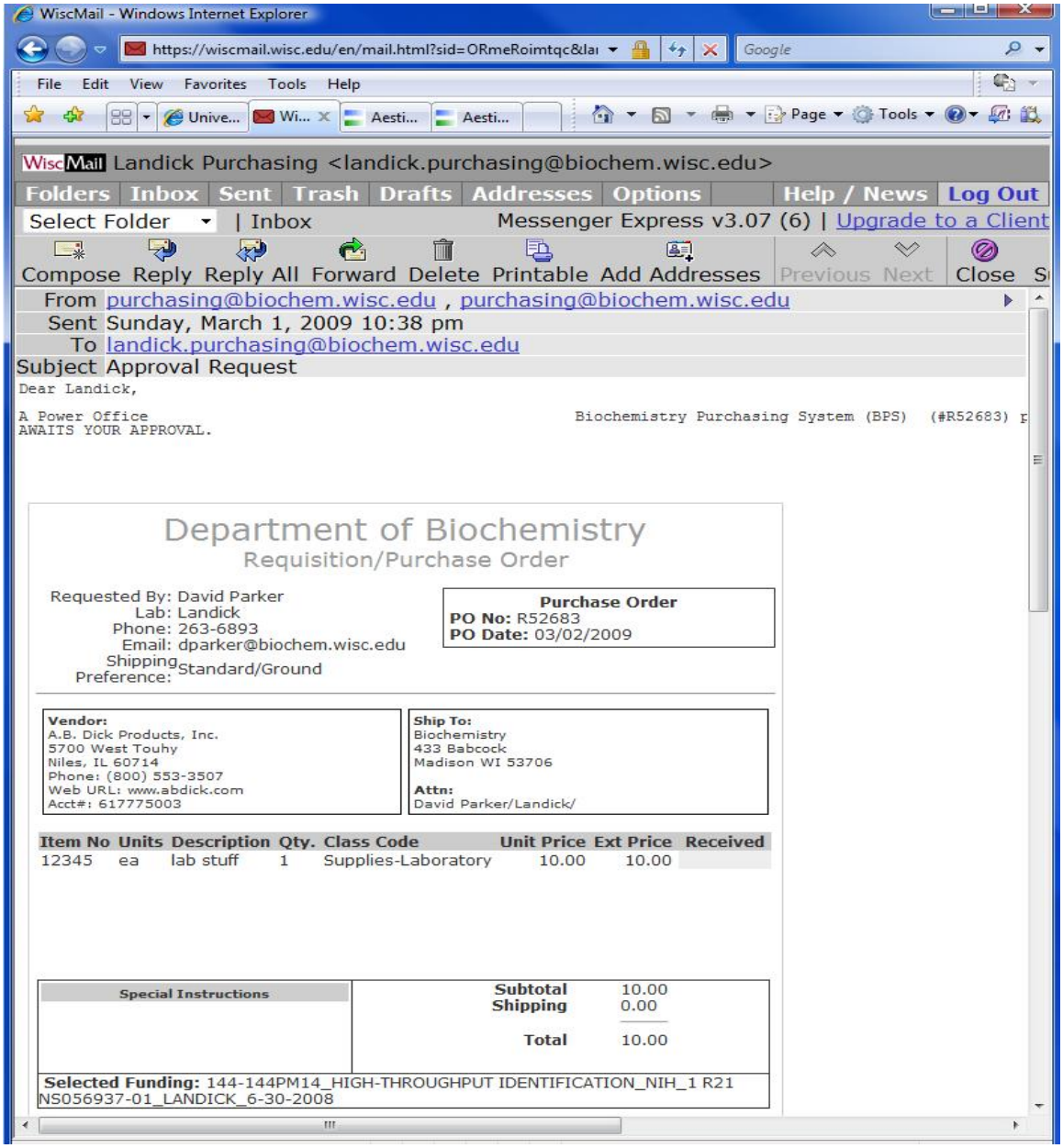
Adding a new vendor(2,2)

After adding the new vendor, please add a note saying that you added the vendor.
Biochemistry Purchasing will review the new vendor data.

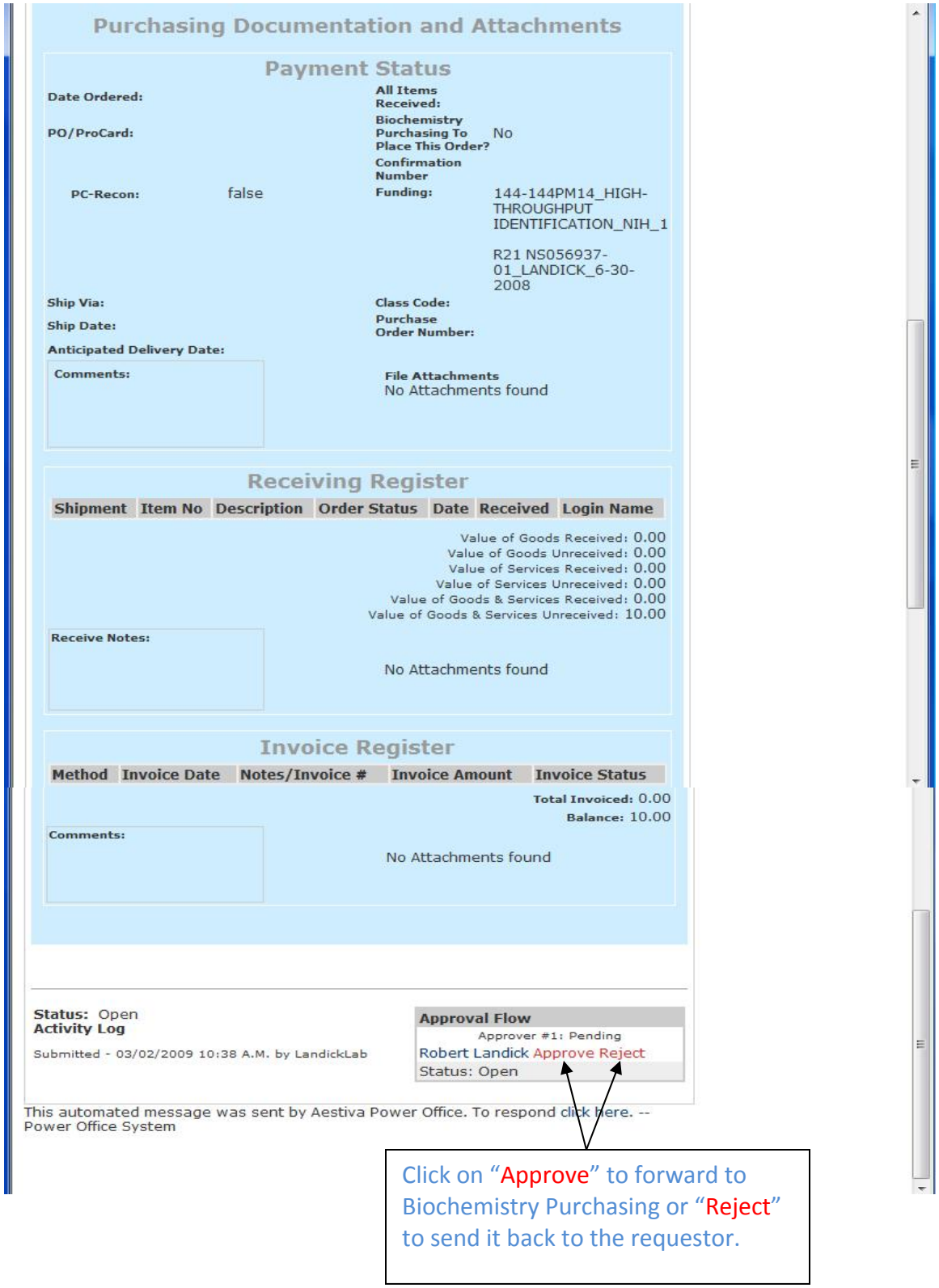


Access the “Approver” email account(1/2)

1. Go to - **https://wiscmail.wisc.edu/mailplus**
2. Enter the email address landick.purchasing@biochem.wisc.edu.
3. The default password is “Default123”
4. Review the purchase request. At the bottom select approve or reject.



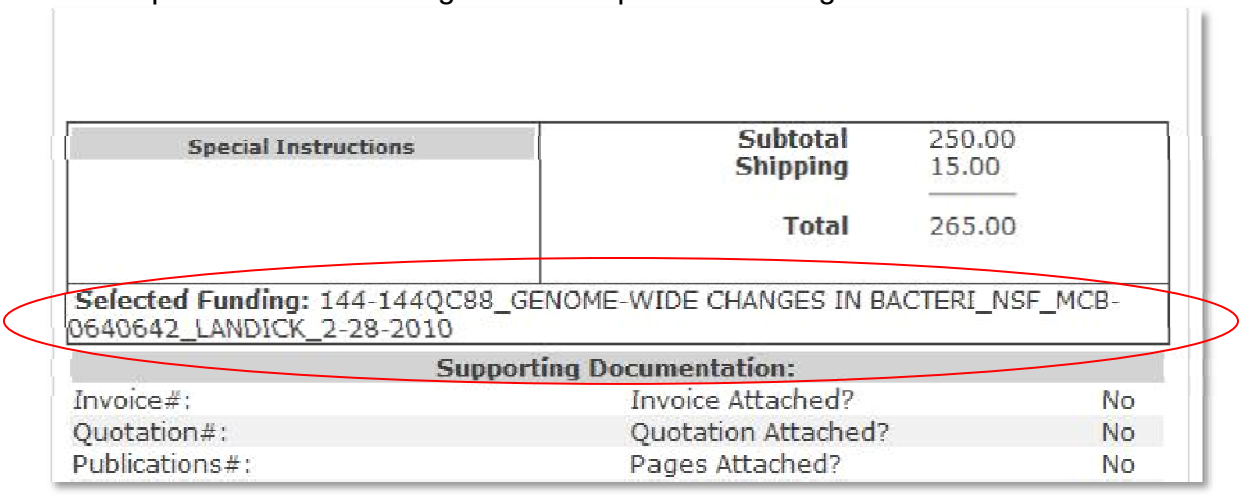
Access the “Approver” email account(2/2)



Procard Reconciling (1/3)

Once you begin using BPS for ordering, you do not need to use 4D to reconcile your biweekly procard statement. When using BPS, the funding that you selected in your order is used to update PVSnet (online system that provides statements) with the funding. Here's how it works.

1. You place an order through BPS and provide funding:



Special Instructions	Subtotal	250.00
	Shipping	15.00
	Total	265.00

Selected Funding: 144-144QC88_GENOME-WIDE CHANGES IN BACTERI_NSF_MCB-0640642_LANDICK_2-28-2010

Supporting Documentation:

Invoice#:	Invoice Attached?	No
Quotation#:	Quotation Attached?	No
Publications#:	Pages Attached?	No

2. The Procard site manager uses this funding data to populate the PVSnet:

Transaction Review

Vendor Name	Original Currency Amount	Settlement Amount	Card ID	Cardholder Name	Account (SFS)	Fund	Department (Omit the A)	Program	Project (must be 7 characters)
BIOLOG INC	244.48	244.48	230	DAVID PARKER-LANDICK	3105	144	073000	4	144PK72
BIOLOG INC	-1130.12	-1130.12	230	DAVID PARKER-LANDICK	3105	144	073000	4	144PK72
CLONTECH LABORATORIES	339.00	339.00	230	DAVID PARKER-LANDICK	3105	144	073000	4	144PK72
GILSON, INC	272.68	272.68	230	DAVID PARKER-LANDICK	3195	144	073000	4	144PK72
INVITROGEN 16098180	38.04	38.04	230	DAVID PARKER-LANDICK	3105	144	073000	4	144PF97
LAKESIDE CURATIVE SERV	54.50	54.50	230	DAVID PARKER-LANDICK	3105	144	073000	4	144PK72
NEOCLONE BIOTECHNOLOGY	265.00	265.00	230	DAVID PARKER-LANDICK	3105	144	073000	4	144QC88
QIAGEN INC.	815.00	815.00	230	DAVID PARKER-LANDICK	3105	144	073000	4	144PK72
WISC SOFTWARE UW TECH STO	373.63	373.63	230	DAVID PARKER-LANDICK	3150	150	073000	4	150A931

her allocation is allowed.

Save Revert

Procard Reconciling (2/3)

3. When the Procard Cardholder receives their by-weekly statement, the funding is reflected on the statement:

Cardholder Statement of Account — Page 1
UW - MADISON — 5/12/2009

Statement of Account

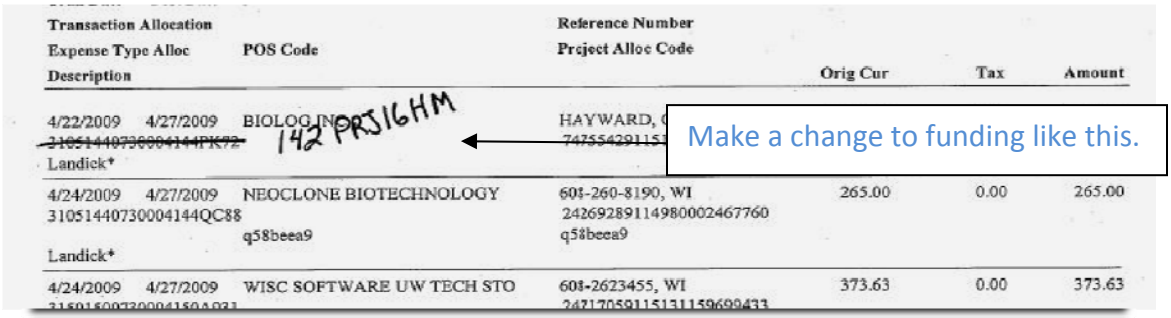
For Transactions posted between 04/27/2009 to 05/01/2009

DAVID PARKER-LANDICK 0230
UW MADISON
BIOCHEMISTRY
433 BABCOCK DR
MADISON, WI 537061544

Limits	Daily	Monthly	Cycle	Single Purchase
Transactions	0	0	0	
Amount($)	0	0	25,000	5,000

Tran Date / Post Date / Merchant / City, State / Transaction Allocation / Reference Number / Expense Type Alloc / POS Code / Project Alloc Code / Description	Orig Cur	Tax	Amount
4/22/2009 4/27/2009 BIOLOG INC HAYWARD, CA 31051440730004144PK72 74755429115151129580193 Landick*	-1,130.12	0.00	-1,130.12
4/24/2009 4/27/2009 NEOCLONE BIOTECHNOLOGY 608-260-8190, WI 31051440730004144QC88 24269289114980002467760 q58beea9 q58beea9 Landick*	265.00	0.00	265.00
4/24/2009 4/27/2009 WISC SOFTWARE UW TECH STO 608-2623455, WI 31501500730004150A931 24717059115131159699433 343971 343971 Landick*	373.63	0.00	373.63
4/24/2009 4/27/2009 LAKESIDE CURATIVE SERV 262-5980098, WI 31051440730004144PK72 24325459116900019613809 UWMADLA001 UWMADLA001 Landick*	54.50	0.00	54.50

As a card holder, you need only review the funding for accuracy. If all the funding is correct, sign the statement and return it to the site manager. If changes are needed, mark the changes needed, sign and return to the site manager. Please attach all required documentation to the BPS record.



Procard Reconciling (3/3)

4. A report has been created to help you review Procard activity. Go to "Reports", and then select "Procard Reconciliation". Enter the start and end dates for the period of activity you'd like to review, and select your card from the list.

Enter query below and Generate Report. To download this report, click here. To save as file, click here. To print this report, click here or view as PDF. To email this report, click here. Edit help

Report Query — Generate Report

Submit Date >= 05/04/2008 **AND** **Submit Date** <= 05/12/2009 **AND**

PC_RECON ="false" **AND** **PROCARD** Contains Landick 0230 ?

Approval Number	DATE_ORDERED	Lab	Payment Method	Vendor Name	FUNDING	Total	PC_RECON
4914	04/06/2009	Landick	Landick 0230	Biolog, Inc.	144-PRJ19PN_TRANSCRIPTION REGULATION THROUGH RNAP SECONDARY CHANNEL_NIH_LANDICK_6-30-09	2,209.00	false
4913	04/06/2009	Landick	Landick 0230	Biolog, Inc.	144-PRJ19PN_TRANSCRIPTION REGULATION THROUGH RNAP SECONDARY CHANNEL_NIH_LANDICK_6-30-09	441.68	false
2479	12/03/2008	Landick	Landick 0230	Phenix Research Products	144-PRJ16PZ_OLECULAR MECHANISMS OF TRANSCR_UA - BIRMINGHAM_003_LANDICK_3-31-2009	2,655.60	false
2734	12/15/2008	Landick	Landick 0230	Omega Engineering Inc.	144-144QC88_GENOME-WIDE CHANGES IN BACTERI_NSF_MCB-0640642_LANDICK_2-28-2010	208.00	false
2903	12/30/2008	Landick	Landick 0230	Dell	144-144QC88_GENOME-WIDE CHANGES IN BACTERI_NSF_MCB-0640642_LANDICK_2-28-2010	940.10	false
2904	12/29/2008	Landick	Landick 0230	National Instruments	144-144QC88_GENOME-WIDE CHANGES IN BACTERI_NSF_MCB-0640642_LANDICK_2-28-2010	1,582.68	false
5474	04/30/09	Landick	Landick 0230	Sigma Aldrich Research	144-144QC88_GENOME-WIDE CHANGES IN BACTERI_NSF_MCB-0640642_LANDICK_2-28-2010	134.02	false
2200	11/12/2008	Landick	Landick 0230	Lakeside Curative Services	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	45.50	false
2224	11/06/2008	Landick	Landick 0230	Bio-Rad SUPPLY CENTER	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	379.05	false
2225	11/12/2008	Landick	Landick 0230	Integrated DNA Technologies	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	59.75	false
2276	11/20/2008	Landick	Landick 0230	Stratagene	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	701.00	false
2477	12/03/2008	Landick	Landick 0230	Lakeside Curative Services	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	218.00	false
2561	12/05/2008	Landick	Landick 0230	Zymo Research	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	244.80	false
2733	12/15/2008	Landick	Landick 0230	Small Parts, Inc	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	18.70	false
2797	12/18/2008	Landick	Landick 0230	New England BioLabs	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	237.60	false
3520	1/29/2009	Landick	Landick 0230	Integrated DNA Technologies	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	29.50	false
5262	04/16/2009	Landick	Landick 0230	Biolog, Inc.	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37 GM038660_LANDICK_6-30-2011	136.22	false
5263	04/21/2009	Landick	Landick	Biolog, Inc.	144-144PK72_STRUCTURE/FUNCTION OF TRANSCRI_NIH_R37	200.00	false

Notes: